Project Closeout Report
Presented to the IT Committee June 5, 2008

Project Name: Project Management Information System (PMIS)

Agency: Enterprise Project

Business Unit/Program Area: EPM Advisory Group

Project Sponsor: Mike Ressler

Project Manager: Mark Molesworth

In each of the objectives labeled "Partially Met" it should be noted that the toolset provides the capability to fully meet the objective, however the level of usage is not sufficient to gain an accurate measurement at this point. The Project Manager intends to conduct another measurement prior to the beginning of the 2009-2011 biennium.

Project Objectives	Measurements	
	Met/ Not Met	Description
Increase/Improve project communications. 1. Provide uniform collaboration tools – team portals or dashboards	Partially Met	1A. The toolset provides effective and efficient communication via team portals or dashboards (measurement on a Likert Scale) Due to the low usage of the system, there is little data on the effectiveness and efficiency of the team portals and dashboards.
	Not Met	1B. Within 3 months of full implementation, 25% of all Large Information Technology projects that utilize the toolset will establish and utilize team portals or dashboards as a management tool. Within 1 year, the percentage will increase to 75%. Only a small percentage of the state's projects, regardless of size, are presently being managed within the toolset. As processes are established, and users gain a comfort level with the system, the usage is expected to increase.
2. Develop enhanced reporting capabilities.	Partially Met	2A. Reports and/or dashboards will be created that provide automated, real time reporting of budget and schedule data to provide alignment with NDCC 54-35-15.3, NDCC 54-59-23, and STD009-05. The toolset contains a multitude of reports that will be useful to general project management. As a deliverable of the project, a single report was created to generate the data necessary to report progress on large projects in accordance with NDCC. More testing is required to ensure the appropriate data is entered into the system to ensure the reports will be accurate.

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Project Objectives	Measurements: Met/ Not Met	Measurements: Description
Improve resource management. 1. Project portfolio management (e.g. resource allocation)	Met Met	1A. Automated resource allocation information This functionality is available and the Department of Human Services is presently piloting the functionality. 1B. Automated time recording to project tasks will eliminate the manual update of Microsoft Project data allowing the Project Managers to analyze rather than input data. This functionality is available and the Department of Human Services is presently piloting the functionality.
Allow for better strategic decision making. 1. Integrated records management and historical documentation	Partially Met	1A. Provide the technology and business process for a uniform document management system which allows for retrieval and analysis of historical information. Presently there is no enterprise standard for project document retention or sharing of historical information. The toolset contains a document management system which will be utilized to manage and retain critical project documents. It allows for automated reviews, historical tracking and version control. This was noted to be partially met because it has not yet been determined whether the toolset will allow for enterprise review of historical documentation due to the security configuration.
2. Ability to evaluate project health and forecast effect of variances	Met	2A. Automate the project CSSQ management areas and provide analysis tools to identify problems and exceptions. This will occur through the elimination of shadow systems, spreadsheets, and external databases. In addition, automate the forecast of impacts based on those exceptions. The functionality of the toolset will enable the project manager to manage cost, schedule, and scope (as well as risks, issues, etc) without the use of shadow systems. The area of quality can be managed as a high level, but could also lend itself to a more specialized toolset.
3. Ability to conduct enterprise trend and historical statistical analysis	Met	3.A Provide the ability for 2009-2011 biennium projects to provide end-to-end total cost of project budgeting from the appropriation request through project completion. As the toolset is utilized for the planning of large information technology projects, it will be possible to forecast total project costs.

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	Met/ Not Met	Description
Provide continuity of project management practices across the enterprise. 1. Integration between scope, schedule, cost, quality, issue, risk, change, and acceptance management which are presently being met by the use of a variety of individual tool sets.	Partially Met	1A. No baseline for the effort to conduct these processes exists for the manual process. Implementation will be a yes/no measurement. Human capital efficiencies can be measured via the post implementation survey and subsequent measurements up to one year post project. Human capital efficiencies were not measured at this time due to the immaturity of the system. A measurement will be taken prior to the start of the 2009-2011 biennium. Scope - Yes Schedule - Yes Cost - Yes Quality – Yes, at a high level Issue - Yes Risk - Yes Change Management - Yes Acceptance Management - Yes
2. Consistent reporting capabilities to comply with existing standards and laws	Partially Met	2A. Reports and/or dashboards will be created that provide automated, real time reporting of budget and schedule data to provide alignment with NDCC 54-35-15.3, NDCC 54-59-23, and STD009-05 The toolset contains a multitude of reports that will be useful to general project management. As a deliverable of the project, a single report was created to generate the data necessary to report progress on large projects in accordance with NDCC. More testing is required to ensure the appropriate data is entered into the system to ensure the reports will be accurate.
3. Maximize enterprise training / cross-training opportunities	Met	3A. Reduced cost of training will be achieved via the RFP process by volume training, training for trainers, and competitive bidding. Each 3-day training course was budgeted for $1,000 per licensee. We were able to negotiate free online training to be included in the implementation bid. This allowed participants to pre-train before the classroom courses. Therefore, each classroom course was reduced from 3 days to 1.5 days. This resulted in approximately 50% savings in the training section of the budget. 59 Project Manager license2 – 2 training courses ($59,000 savings) 23 Program Manager licenses – 1 training course ($11,500 savings) Total savings = $70,500. *Some of these savings were generated based on post project training and therefore do not reflect in the overall project budget. The enterprise nature of the training allowed us to maximize classroom scheduling resulting in fewer open seats per session.

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Schedule Objectives			
Met/ Not Met	Scheduled Completion Date	Actual Completion Date	Variance
Met	March 2008	February 2008	On Schedule

Budget Objectives			
Met/ Not Met	Baseline Budget	Actual Expenditures	Variance
Met	$310,603 Approved	$296,892	5% Under Budget

Major Scope Changes
Change #1 – PeopleSoft HR integration of resource data = $35,620 Change #2 – Oracle Stored Procedures = $1,953 Total - $37,573.00

Lessons Learned

General

- ✓ Conduct lessons learned at the end of each phase so you don't forget valuable information. Document lessons learned on an ongoing basis

RFI Phase

- ✓ Write the RFI document to the level that is prudent to obtain responses but not overwhelm the vendor with requirements. Vendors will only provide high level responses and marketing information to RFIs. If too much time is taken gathering requirements at this stage, and the decision is made to kill the project, that effort has been wasted.

RFP Phase

- ✓ Ensure that you understand the context of the deliverables you are getting in the RFP ($60K implementation services – what did this include).
- ✓ Provide a script which informs the vendor of the key areas to be covered in the demonstration and ensure that they stay on track during the demonstration. Keep the vendor focused on what we want to see and not what they want to show us.
- ✓ The RFP was authored by a number of separate individuals by breaking it down into sections. Because none of the authors was responsible for the entire RFP, it was difficult to create a flow from one section to another. Have one person, or one small team responsible for the authoring of the document to ensure consistency.
- ✓ Should have understood more about the training effort and learning curve for the product. This could be covered in the RFP response or during the product demonstrations.
- ✓ From an agency perspective, the time commitment for each resource should be defined specifically so additional responsibilities can be accounted for.

Implementation Phase

- ✓ Don't have a core member of the project team also act as the project manager. When things get busy, the project tasks will be prioritized and the project management tasks will suffer.
- ✓ Take minutes during each session to ensure the team was informed of decisions made. This would avoid rehashing information and re-discussing decisions that had been made earlier.
- ✓ The initial plan included only those tasks to meet the deliverables of the vendor contract. A WBS should have been conducted to define all of the work that the ND project team needed to complete in order to meet the objectives of the charter.
- ✓ Do a better job of issue tracking (e.g. system issues). We didn't know sometimes if an issue was resolved or have documentation regarding how it was resolved for future use.
- ✓ We thought we could use Primavera to manage the implementation project, however the toolset was not configured to provide the functionality we needed to manage the project successfully until very near the end of the project. The team should have utilized WMS to manage documents, issues, impacts, etc. for this project.
- ✓ Testing should have included a formal sign off of testing plans to ensure all testing was done. Some testing was not completed by the time the project was implemented. Other test plans did not fully test the functionality of the product.
- ✓ Specify a dedicated timeframe for testing to take place in a controlled environment.

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Success Story
RFI Phase ✓ This project generated an RFI template that has been used several times over by other agencies/projects. Prior to this project, no administrative rules or templates existed to guide the RFI process. RFP Phase ✓ The charter was drafted to choose the best "project management" toolset. The process allowed us to choose the best toolset to meet our needs in a pool of products which also provide portfolio management, lifecycle management, etc. ✓ This RFP is being used by the ITD procurement office as a sample of a quality RFP. ✓ Using the Work Breakdown Structure to walk through the RFP process was very helpful as we were able to see the process with all of the various tasks and timelines required to successfully complete the process. Implementation Phase ✓ This was truly an example of a cooperative enterprise effort to obtain a product/service that utilized the fiscal and human resources of the enterprise to leverage savings via a single product. ✓ The testing issues that were identified in this project may lead to a whitepaper developed by the EPM Advisory Group (including a sample WBS) to guide future COTS product implementation testing phases. ✓ Able to leverage training resources and train agency staff in an enterprise environment. ✓ Able to develop a Center of Excellence to guide the future growth and development of the product for the enterprise.